

HOME TEAM AREAS OF SERVICE MEDIA CONTACT BLOG



# Preserving, Growing, and Protecting Your Wealth



Investments

**Financial Planning** 

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**Insurance Services** 

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Preserve Wealth Oklahom...





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## CALL US TODAY: (405) 286-0283

**Preserve Wealth Oklahoma** was founded with the goal of assisting our clients in every aspect of their financial lives. We've provided the most comprehensive and personal service available, thus earning a reputation for excellence in our industry. For each of our clients we strive to create **financial stability and security** to provide financial independence and peace of mind. Call us today at (405) 286-0283.

#### **Investments & Savings**

- Managed Accounts
- Brokerage Accounts
- Annuities
- Common Stock
- Bonds
- Government Securities
- Mutual Funds
- Exchange Traded Funds
- 529 College Savings Plans
- Traditional IRA
- Rollover IRA
- Roth IRA
- SEP IRA
- Simple IRA

#### **Financial Planning**

- Retirement Plans
- Tax Plans
- 401k Planning
- 403b Planning
- College Plans
- Estate Plans
- Money Management
- Money Purchasing Plans
- Profit Sharing Plans

#### Insurance

- Disability Income Insurance
- Life Insurance
- Long Term Care Insurance
- Individual Health Insurance
- Group Health Insurance

### Our Principle

Our company is based on the principle that education and understanding of your current financial situation is vital to successfully make prudent decisions concerning your future financial condition. If you have any questions about your current financial situation or wish to schedule an appointment please contact us.

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Email: ddaugherty@preservewealthok.com						
Hours:						
		Mon - Fri	9:00 a	am - 6:00 pm		
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